

New Features and Upgrades for October



October 2007 Release Schedule Highlights

October 19, 2007

- ▶ Client Face Sheet Upgrades
- ▶ History View
- ▶ Appointment History
- ▶ Enhanced HR Functionality
- ▶ Daily Schedule Print View
- ▶ Client Enhancements
- ▶ Block Overlapping Services
- ▶ Billing and Reporting Upgrades
- ▶ Report Updates

November 2007

- ▶ Look for an email from us with more info on what you can expect from the next Credible software release!

Previous Release Highlights: Aug 2007

- ▶ Employee Home Page and Navigation
- ▶ Dashboard Expansion, Homepage Enhancement
- ▶ Arrived Notification

Complimentary Webcast Tutorial on Software Upgrades!

New Features available October 19, 2007

As the new fall season begins, Credible is busy building innovative features and completing helpful upgrades. Advances to admin tools make it easier to manage employees. Billing upgrades simplify submission, payment and reporting. Credible's October Software Release continues to improve functionality and ease of use.

October Software Spotlight: New Face Sheet Features, Appointment History, Enhanced HR Functionality, Client and Billing Upgrades

Client Face Sheet Upgrades

View profile information more easily. The new configurable section headers allow you to organize the face sheet into distinct groups. This feature works with clients, employees, client extended information and episodes.

Kathleen Washington (3245)				Update	Delete	Edit Login
EMPLOYEE INFO						
Last Name	Washington	First Name	Kathleen Ellen			
Status	ACTIVE	DOB	1/10/1959			
Gender	Female	Can Supervise?	YES			
External ID	3245					
Credentials Section						
Title	Executive Director					
Contact Info						
Region(s)	Anne Arundel, Howard	Address 1	123 Main Street			
Address 2		City, State	Columbia, MD			
Zip	21048	Home Phone	555-123-4898			
Mobile Phone	555-755-8555	Work Phone	555-755-8979			
Fax Number		Billing Group	10			
Pager Number		Emergency Contact	Sam Smith			

History View

Quickly view changes made to chosen fields through this new feature. Field changes are tracked and viewed by field links for viewed by field links for Clients, Clients' Extended Information, Employees, and Episodes. Click on a link, and the Log Details window will appear, listing the change history for that field. History of changes is displayed for fields in the Data Dictionary set to Show History links.

Log Details - Windows Internet Explorer

Log Details for Status: Close

Change Date	Changed By	Old Value	New Value
10/17/2007 1:00:06 PM	Cuna, A	ON HOLD	ACTIVE
10/17/2007 12:14:33 PM	Cuna, A	ACTIVE	ON HOLD
10/17/2007 2:16:53 PM	Cuna, A	ACTIVE	ASSIGNED/N
10/17/2007 2:42:54 PM	Cuna, A	ASSIGNED/N	ACTIVE

Done

City	Annapolis, MD
Status	ACTIVE
Zip Code	21401
County	Prince Georges
Sex	Male

Show Change History

Appointment History

Please contact your Account Manager if you would like a webcast to review the new features.

Credible Software Tips:

Check here every release for easy-to-use tips from Credible team members.

Did you know that you can save Custom Filters in your Saved Report? Whenever you save a report, it will automatically save the custom filters you selected, so you can have the same results view every time!

-Josh

Josh Robinson
Account Manager

Do you want to share these release notes with a colleague? Do you need a PDF version of this email for printing? [Click here](#) with your request.

Appointment History

Now you can check a client's appointment history off their schedule. View no shows, cancelled appointments and status by date range by clicking the new history button on the client schedule.



Enhanced HR Functionality — Super View and Super Edit

Added security settings and increased HR functionality with the new Super View and Super Edit feature. Those with administrative rights can easily restrict employees from viewing and editing chosen fields on employee and client pages based on security settings.

Daily Schedule Print View

Now you can easily view and print your daily schedule. Simply click on a day on your schedule or an employee's schedule and then click the Printer View button. All of the appointments for that day will be listed, so it's easy to follow and manage your time.

Kathleen Washington (3245) Monday, October 15, 2007	
ALBERTSON, George (SCHEDULED) 08:15 AM-09:00 AM Day Prog K Washington (857) 298-3105 #35928962 VO 123-78-4815	
COLEMAN, Michael (SCHEDULED) 09:45 AM-11:00 AM Intake R HALE (914) 958-9996 #52711189	
BOYD, Margaret (SCHEDULED) 11:30 AM-12:45 PM Intake (964) 057-4191 #17833763 MAPS 12028298000	
ADAMS, Trey (SCHEDULED) 2:15 PM-3:00 PM JDPR Daily S BREWERS (231) 436-2080 #2973323	
O'NEAL, Debra (SCHEDULED) 3:15 PM-4:00 PM 6MAssment (377) 501-2002 #13906447 41301734700	
MILLER, Vivian (SCHEDULED) 4:15 PM-5:30 PM Day Prog T CALDWELL (277) 695-6920 #23760122	

Client Enhancements

Client Insurance Notes: Notes can now be added to a Client Insurance entry.

Client "Do Not Call" Mark: Client can be displayed not to be called via Planner Printer View by phone number strikethrough.

MON 10/15	TUE 10/16	WED 10/17
ALBERTSON, George (123-78-4815) 08:15 AM-09:00 AM (857) 298-3105 Day Prog K Washington	BEASLEY, Janace () 08:15 AM-09:00 AM (348) 255-3726 Case01 H GAIA	COLEMAN, Michael () 08:15 AM-09:00 AM (914) 958-9996 6MAssment Do Not Call JONES, Robert

Search Clients by Medication: Now you can find clients by medication. Just choose "Medication" from the drop down menu and enter a medication name in advanced search.

Client Liability Copays (for PA customers): Client Liability Amount will cause Co Pay to cap out once a client spends all he or she is liable for the month. Once a client meets Max Monthly Liability, the client no longer owes any out-of-pocket money, therefore, Client Due from that point on should be 0.00 for the rest of the month.

Tx Plan Update: Default Duration can be set for Tx Plan so that an End Date automatically populates. You can also set an End Date Trigger, which will send a notification when the Tx Plan End Date is approaching.

Blocking Overlapping Services

Visits can be blocked so that they do not overlap existing visits done for a client or by an employee. If you submit a visit that overlaps the time for a visit that already exists in the system, you will get an error message and be prevented from submitting the visit until the date and/or time is changed. This is one of Credible's optional features and needs to be turned on by an administrator.

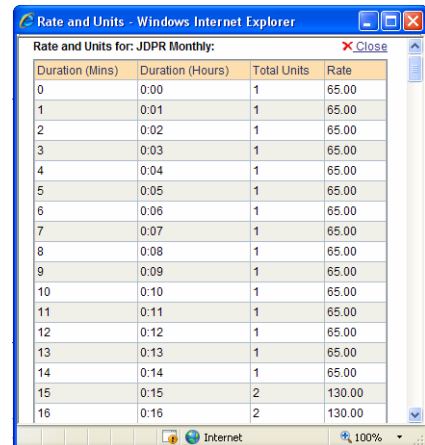
Simplify Billing and Reporting with Upgrades

Custom Export Batching: New batches button on main Export list allows you to view batches. Exports can be batched, and results that are batched no longer get pulled into that type of Export Report.

Billing Matrix Search/Filter: Search easier with new filters by visit type, credentials and more. With this new feature, it is easier to narrow down the results on the Billing Matrix screen.

Multi-step Billing Undo: Remove one billing action at a time so payments can post even after an initial claim has been paid and closed. There are two steps that are undone when you undo a payment. When a payment is removed the transfer of a balance is undone as well.

Rate and Unit Chart: New rate and unit chart for Billing Matrix entries makes it easy to see the rate that will be charged for a visit duration, and how many units are used for that duration.



Duration (Mins)	Duration (Hours)	Total Units	Rate
0	0:00	1	65.00
1	0:01	1	65.00
2	0:02	1	65.00
3	0:03	1	65.00
4	0:04	1	65.00
5	0:05	1	65.00
6	0:06	1	65.00
7	0:07	1	65.00
8	0:08	1	65.00
9	0:09	1	65.00
10	0:10	1	65.00
11	0:11	1	65.00
12	0:12	1	65.00
13	0:13	1	65.00
14	0:14	1	65.00
15	0:15	2	130.00
16	0:16	2	130.00

Form Builder Enhancements

"No answer" option: You now have the ability to label check boxes, radio buttons or any other answers that open into a notes box to have the option to have no answer.

Notes Section Mapping: Notes section for an answer with Notes can now be mapped.

Report Updates

Threshold on Balance Detail: Only services with rates greater than or = to Threshold Amt are displayed on Balance Detail Report.

Authorizations Export: Export button added to Authorizations Report.



We want to hear from you. If you have an idea, question, or comment regarding Credible Software Releases or our release process, please call or email Credible today!

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